

PORTFOLIO
EXPLORATION
TOOL

Portfolio Exploration Tool

Facilitator's Guide



Observatory of
Public Sector Innovation



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Getting started

Thank you for registering to host your own Portfolio Exploration session!

This session is a self-organised innovation strategy session with your organisation or team based on the results from the online Portfolio Exploration tool developed by the OECD Observatory of Public Sector Innovation (OPSI).

The following facilitator's guide contains guidance for hosting and running your self-organised Portfolio Exploration strategy session.

You have received this facilitator's kit because you have expressed interest in hosting your own session prior to the Government after Shock event on 17th November 2020.

If you have any additional questions about the session, please do not hesitate to contact opsi@oecd.org.

Scheduling and hosting the session

The Portfolio Exploration session is part of the programme of the Government after Shock conference held from 17th to 18th November 2020, and the self-organised session should be held prior to the conference.

Date	Please host your self-organised session between the 9th and 16th November
Duration	Please schedule at least 2 hours for this workshop.
Location	<p>You can host this session virtually or in person. The exercises offer different options depending on the format of the workshop.</p> <ul style="list-style-type: none"> • Virtual session: You will need a video calling software with screen sharing and chat functionality (e.g., Skype, Microsoft Teams, Zoom, etc.). • In-person session: You will need a whiteboard and screen projector. You can also print out materials.
Topic	<p>Decide in advance which innovation portfolio you want to analyse:</p> <ul style="list-style-type: none"> • Is it for your specific team? <ul style="list-style-type: none"> ○ This analysis will give more precise results for a specific work group, project team, or division of your organisation ○ This analysis may be valuable for uncovering nuanced differences of perspective among individuals within the team and building a shared understanding of your innovation work, now and in the future. • Is it for your whole organisation? <ul style="list-style-type: none"> ○ This analysis will be less precise for large organisations but can provide a quick overall snapshot from different perspectives. It may be difficult to answer some questions

	<p>especially if an individual or team does not have a broad view into the entire organisation.</p> <ul style="list-style-type: none"> ○ This analysis may provide a broad, initial snapshot of the various perspectives of innovation within an organisation. It can be helpful in providing a general sense or starting point for a deeper analysis of innovation in your organisation. ● Is it for several different teams within your organisation? <ul style="list-style-type: none"> ○ This analysis can be done to compare and contrast the innovation activities between several teams (units, project teams, etc.) but may not give a full picture of the organisation. ○ This analysis will give a comparative perspective between different teams in your organisation (for instance, Finance versus Research & Development) to understand how each contributes to the overall organisational innovation portfolio. This may be valuable for teams working together on a shared agenda or organisational initiative. <p>Your choice of analysis will inform the perspective you gain (organisational versus team portfolio) as well as the instructions you provide to participants.</p> <p>Your participants will identify an “organisation” when they complete the tool. Be sure to let them know which team, unit, department, organisation they are asked to analyse.</p>
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Inviting participants

The mix of participants for this session is flexible and up to you. Your choice of topic will inform your participant list.

Number of participants	You can invite as many or as few people to the session as you want. We estimate that the session works best with 5-10 participants to enable rich discussion.
Who to invite	Your topic will determine who you invite. Participants can be from the same team or from across the organisation. Please aim to include a facilitator or participant who has oversight over the different innovation projects in your team or organisation.
Preparation required from participants	If possible, please ask participants to complete Module 1 and 2 of the online Portfolio Exploration self-assessment prior to the session . If this is not possible, nominate 1-3 team members to complete the self-assessment for the organisation or the team. The online self-assessment typically takes between 30 to 45 minutes.

	<p>The self-assessment tool is accessible here: https://oecd-opsi.org/portfolio-exploration/. To access the tool, you need to create an account at the OPSI webpage.</p> <p>Please indicate the topic for the self-assessment – e.g. whether participants should take the perspective of a specific team or the whole organisation when they complete the assessment. This ensures that results are comparable.</p> <p>Participants could either share their self-assessment results with facilitators in advance, or voluntarily discuss their results during the session. As a host, define this in advance and set expectations when inviting participants to take the self-assessment.</p>
Invitations	<p>Together with this guide, we have provided you with:</p> <ul style="list-style-type: none"> • A template invitation email to participants that you may use as needed. • Step-by-step instructions for participants to take the online self-assessment. • A teaser video inviting participants to join the session.

Preparing the session

The Portfolio Exploration session is designed for you to host it independently and without external support. It is based on the online Portfolio Exploration self-assessment tool. The session requires hosts and participants to have taken the self-assessment prior to the session, and the session uses your personalised results. There are some prerequisites that facilitators and/or hosts must prepare in advance to run the session successfully.

Designate a facilitator	Hosts must designate one facilitator for the session (the host and the facilitator may be the same person).
Preparation time for facilitators	As facilitator, please plan at least 2 hours of preparation time to take the self-assessment, familiarise yourself with the materials, and collate the required materials for the session.
Using the PET self-assessment	<p>The Portfolio Exploration session is based on the online Portfolio Exploration self-assessment. To prepare for the session, please:</p> <ul style="list-style-type: none"> • Take the online self-assessment or nominate someone to do it for you. After taking the self-assessment, you will be able to download your results report. The results report includes an assessment of the innovation profile of your team or organisation and recommendations for strengthening your innovation portfolio. The self-assessment tool is accessible here: https://oecd-opsi.org/portfolio-exploration/.

	<ul style="list-style-type: none"> • Choose which results to use during the session. We recommend that all participants take the self-assessment prior to the session. However, during the session, we recommend only using 1-3 results reports to avoid too much complexity. Option 1: Choose one Results report. This can be the Results report from the host or facilitator, or any of your participants, but it is best if it comes from someone with a good overview of innovation projects in your team or organisation. Option 2: Choose up to 3 Results reports. If you want to have a broader perspective or there is no single person with a good overview of innovation projects, you can use up to 3 Results reports in your session. Ask those nominated to take the self-assessment to send the results to the facilitator. • Use the results report in the slide presentation. Your personalised report will be the basis for discussions during the session. Please copy and paste the results report into the slide presentation. There are instructions for how to do this in this document (p. 20, p.23, p. 27) and in the slide presentation.
Materials to prepare before the session	<p>There are several things to prepare prior to the session:</p> <ul style="list-style-type: none"> • Slide presentation. Please familiarise yourself with the slide presentation before the workshop. • Results report. Please copy the Results Report(s) you have selected into the slide presentation (slides 11-13, 15-17). • Organisational goals. Please prepare a list of informal or formal strategic goals for your team or organisation (slide 19).
Materials to collate during the session	<p>Throughout the session, the role of the facilitator is to take notes from the discussions with participants (indicated in the workshop guide, pp. 8-32).</p>
Materials to send to OPSI after the session	<p>After the session, please the following materials send to OPSI:</p> <ul style="list-style-type: none"> • Answers to the mandatory question in Section 4 (find more information on p. 28 of this document). • Feedback from participants (find more information on p. 30 of this document).

After the session

Learning session

After you have hosted your session, we invite you as a local host to share your experience with us and peers from all over the world during a learning session at the Government after Shock conference on 17th November, 2:30 pm - 4:00 pm UTC+1. You can sign up to the session here:

<https://zoom.us/meeting/register/tJUpdeuqqTlpHNHnEbWLdVM5-yOeuNOd0wMY>

We will send all hosts a Zoom invite to the learning session on the afternoon of the 17th November. Please forward this invite to your participants and encourage them to join the learning session.

During the learning session, we will send all hosts and participants into different breakout rooms for peer discussions on your experiences with the PET self-assessment tool and strategy session. As hosts or facilitator joining the learning session, we expect you to facilitate breakout rooms together with hosts from other organisations. At the end of the breakout session, we will ask some hosts/facilitators to share back the main points of the peer discussions.

Follow up interview

After you have hosted your session, we will contact you for an interview on your experience of portfolio management and the PET tool. A researcher from the University of Maastricht who is writing a thesis on innovation portfolio management will conduct the interview. This interview will require an hour of your time, your answers and organisational details are anonymised if you wish, and no preparation is required.

OPSI would appreciate your collaboration and valuable feedback for improving our tool. If you would like to opt out of the interview, please get in touch with chiara.bleckenwegner@oecd.org.

Beyond the session

The PET innovation strategy session is not just a one-off activity, you can retake it as many times as you like. You can make portfolio sense-making activities a continuous process in your team and organisation to keep readjusting your innovation portfolio management.

If you want to go further, here are some ideas for building on the insights from Portfolio Exploration session. You could:

- Analyse who else needs to be behind the table to look at your organisation's innovation portfolio in the most effective manner
- Start to evaluate and measure innovation portfolio performance, rather than the success or failure of singular projects
- Align your innovation portfolio management with the strategic decision-making processes and your organisation's strategic aims
- You can contact OPSI at opsi@oecd.org to learn how to organise an organisation -wide portfolio assessment where different results can be linked across the organisation.

Running the session

The following pages guide you through the facilitation of the workshop and accompanies the workshop slide deck that you have received. There are five sections to the workshop:

1. **Welcome and instructions (10 minutes)**
2. **Setting the stage: What is innovation portfolio management? (10 minutes)**
3. **Taking stock: What innovation do you have in your portfolio? (60 minutes)**
4. **Rebalancing: What do you want in your portfolio? (30 minutes)**
5. **Wrap up and next steps (10 minutes)**

In each section of this facilitation guide, you will find a description of the purpose of the section, a thumbnail of the slides that accompany the section, the facilitator script for the section, and the exercises in the section.

For each exercise, there will be suggestions on how to run the exercise in virtual or in-person format.

For ease of use, different symbols indicate different activities throughout the workshop.

Activities key



Facilitator script



Exercise for participants



Exercise duration



Facilitator should take notes here



Requires electronic material

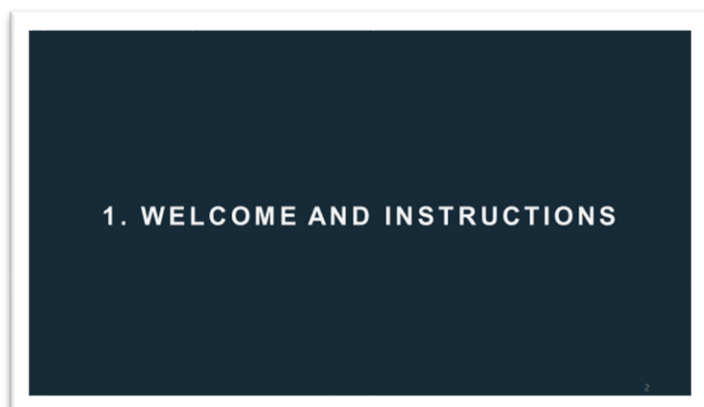


Requires pre-prepared documentation (in red)

Section 1. Welcome and instructions (10 minutes)

***Purpose:** To start the workshop, this section is a chance to welcome participants to the workshop, introduce its purpose, and explain how it will work.*

Welcome and instructions



Facilitator script (use as needed):

“Welcome to the Portfolio Exploration strategy session!

In an era of crisis and complexity, public sector organisations need to align their portfolios with new needs and ambitions. The first step is to understand your innovation portfolio and start to steward it strategically.

The OECD Observatory of Public Sector Innovation invites public sector organisations around the world to analyse your innovation portfolio using the Portfolio Exploration Tool. The purpose of the session is to understand your team’s or organisation’s innovation portfolio based on the results of the self-assessment completed online. This session aims to explore some aspects of good portfolio management to help you build or strengthen your innovation portfolio management capability. Throughout this session, we hope you will:

1. Gain a better understanding of your innovation portfolio from a broader team or organisational perspective
2. Start thinking about a broader innovation portfolio strategy that will help you achieve your goals.”

Agenda

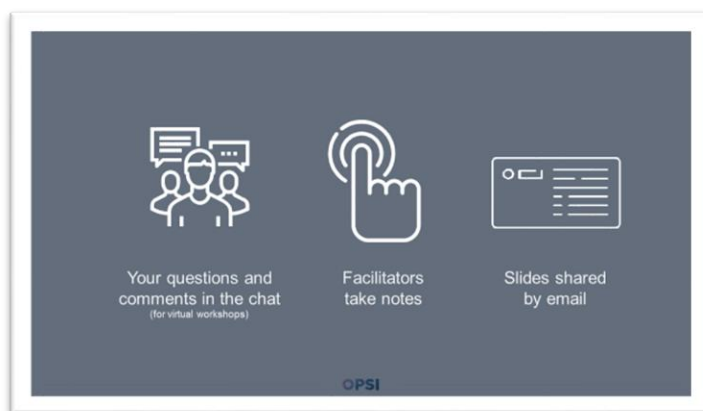
AGENDA	
10 mins	1. Welcome and instructions
10 mins	2. Setting the stage What is innovation portfolio management?
60 mins	3. Taking stock What innovation do you have in your portfolio?
30 mins	4. Rebalancing What do you want in your portfolio?
10 mins	5. Wrap up and next steps



Facilitator script (use as needed):

“The agenda will be as follows: first, we will review what innovation portfolio is. Then, we will discuss what innovation projects we currently have in our portfolio. We will compare the results of the online self-assessment with our own assessment and perceptions. Lastly, we will discuss which strategic goals we want to achieve as a team or an organisation, and how we can balance our innovation portfolio to better achieve our goals. At the end of the session, we will capture what we learned from the session and share our experiences with peers at the Government after Shock conference on 17th November.”

Practical information



Facilitator script (use as needed):

“The workshop will consist of a series of discussions based on the results of the online self-assessment. You can write your questions and comments in the chat (for virtual workshops). The facilitator will be the note taker throughout the workshop, and the slides will be shared with you after the workshop.”



Activity

Ask participants to introduce themselves (if necessary) and to share what they expect from the workshop. For virtual sessions, the chat function can be used for this.



Duration: 5 minutes.



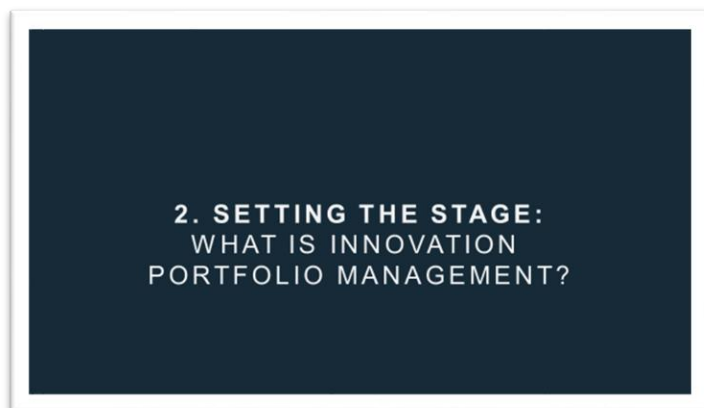
As facilitator, please make note of participant expectations. You can check if expectations were met at the end of the workshop.

- **Virtual workshops:** For virtual workshops, you can summarise observations on a blank slide or a blank shared document (e.g., Google Docs). If you feel comfortable with using digital tools, you can use a virtual notetaking tool (e.g., <https://padlet.com/>) or a virtual whiteboard (e.g., <https://www.mural.co/>).
- **In-person workshops:** For in-person workshops, you can summarise observations on a whiteboard or on flip chart paper.

Section 2. Setting the stage: what is innovation portfolio management? (10 minutes)

***Purpose:** To make participants familiar with the innovation facets model on which the workshop is based, this section introduces the innovation model and the portfolio exploration tool.*

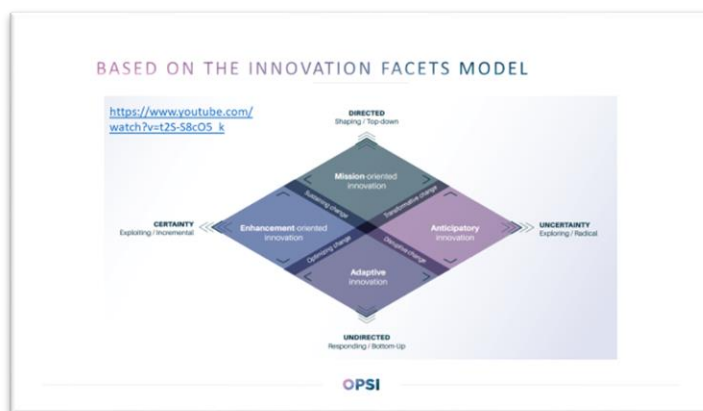
Setting the stage



Facilitator script (use as needed):

“This next part is about understanding different types of innovation and good innovation portfolio management.”

Types of innovation



Facilitator script (use as needed):

“OPSI’s innovation portfolio management tool is based on the Innovation Facets model. This model acknowledges that there are different types of innovation with different levels of certainty and direction. First we will watch a video about different types of innovation.”



 Optional: **Play the video with the introduction to the Innovation Facets model:**

https://www.youtube.com/watch?v=t2S-S8cO5_k

If you are unable to play the video during the workshop, as facilitator please familiarise yourself with the video beforehand.



 Activity

Check for questions from participants. If participants have questions about what different types of innovation mean, additional videos and explanations are below.

If participants have questions that you are not able to answer, it might help to turn questions back around to participants to make it more concrete. For example, what is an example of adaptive innovation in your work?

Anticipatory innovation (video here: <https://youtu.be/30hu04ZeoOg>)

Your organisation tends to concentrate on exploring and engaging with emergent issues that might shape future priorities and future commitments. It has the potential to subvert existing paradigms. Very new ideas generally do not cohabit well with existing reporting structures, processes and workflows, as the specific details of how the idea will work in practice often still need to be teased out. Your organisation's work may often need to be sheltered from core business and have its own autonomy, or the pressures of tangible existing priorities are likely to cannibalise necessary resources.

Your innovation efforts generally involve a high degree of uncertainty (What might be possible? How will people react and be affected?). At a working level, your efforts may often be about trying to reduce this uncertainty through the exploration of new possibilities, to learn about how things could and/or should play out over time. It is supported by methods and practices such as [horizon scanning](#), [strategic foresight and futures thinking](#), [speculative design](#), looking to [lead users](#), regulatory (or other) [sandboxes](#), mechanisms of [challenge](#), and longer-term structured discovery-based challenges.

Enhancement-oriented innovation (video here: <https://youtu.be/qieVAq1XL08>)

Your organisation focuses on upgrading practices, achieving efficiencies and better results, and building on existing structures, rather than significantly challenging the status quo. This facet of innovation generally utilises existing knowledge and seeks to exploit previous innovations. Such forms of innovation can build on existing processes and programmes to achieve greater efficiency, effectiveness and impact. The innovations you work may not be revolutionary or disruptive, and they do not involve rethinking the fundamental system or measures of value. However, they are critical and can have a significant positive impact in government operations. Traditionally, most governments have focused their innovation efforts here.

At a working level, your innovation work is about trying to learn more about how things work and trying to extend upon that. Common practices that underpin work like yours include structured learning processes to help consolidate insights and build upon them, and specific approaches such as [lean](#), [business process management](#), [quality control](#), and [behavioural insights](#). Your work has the potential to cut across many domains of government activity, vary in scope, and can be about reducing costs, increasing the reach of government programs, improving operations, or helping to save lives. The common elements are that they are more augmentations to what is, rather than really rethinking what could be (though that can sometimes follow).

Adaptive innovation (video here: <https://youtu.be/dPkUBK0Y-jo>)

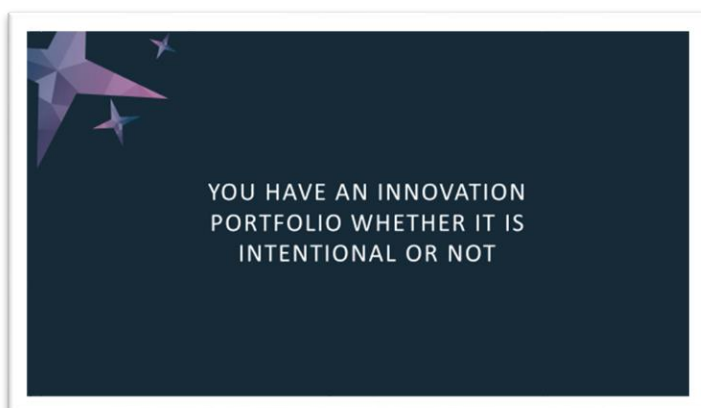
Your organisation concentrates on playing with, testing and trying new approaches in order to respond to a changing operating environment. In your case, the purpose to innovate may in this case be the discovery process itself, driven by new knowledge or the changing environment. When the environment changes, perhaps due to the introduction of innovation by others (e.g. a new technology, business model or new practices), it can be necessary to respond with innovation that helps adapt to the change. An example of such innovation is the use of social media by government organisations to interact with citizens, initially through bottom-up initiatives. Sometimes this type of innovation challenges the status quo and existing missions, which can create internal tension.

Mission-oriented innovation (video here: <https://youtu.be/3l6wdPooX2k>)

Your organisation concentrates on leveraging innovation to achieve clear, often very ambitious outcomes or overarching goals, often coming directly from the senior government leaders or politicians. The goals serve as an overarching driver and uniting force for innovation that guides relevant ecosystem players (whether in one organisation or within and across government and sectors) to work together to achieve them, and to drive new learning and knowledge in order to get there. This top level objective can provide the cover (and resources) for all sorts of experimentation, it spurs on very different kinds of innovations, but there is a clear sense of what needs to be achieved, even if the means by how to get there is not determined or made explicit. Your work may focus on a variety of area. For instance, mission-oriented innovation can be very important for achieving societal goals, though it also works at an organisational or individual level to align activities. Public sector bureaucracies are naturally attuned to this sort of innovation,

provided there is sufficient political will. Methods and practices that can underpin mission-oriented innovation include the use of [systems thinking](#), [strategic design](#), [open innovation](#), and [challenges](#) and [prizes](#).

Innovation Portfolio Management



Facilitator script (use as needed):

“Every organisation uses different types of innovation, and every organisation has an innovation portfolio, whether intentional or not. What is innovation portfolio management?”



Optional: **Play the video with the description of innovation portfolio management:**

<https://youtu.be/9v89s-eJNPM>

If you are unable to play the video during the workshop, as facilitator please familiarise yourself with the video beforehand. You may also send the video link to the participants before the workshop.



Activity

Check for questions from participants. If participants have questions about what innovation portfolio management means, additional examples and explanations are below.

What does good portfolio management capability look like?

Good portfolio management is an innovation sense-making activity that connects your (and sometimes your partners') innovation practise – specific projects, initiatives and programmes – to the intent and purpose behind those activities as well as the strategic goal of the organisation. It should connect problem framing to operations and continuous learning; and allow and organisation to sufficiently resource and support innovation towards defined aims. Effective innovation portfolio management does not only look at the composition of the portfolio (list of innovation projects, initiatives, or investments) and problems, but it analyses what in the system and the organisational structures allows the organisation to be successful in the long term. Innovation portfolio management involves:

- Sensemaking – there is systemic analysis and meaning created around the collective experiences of innovation within the organisation (what are the strategic aims, purposes and synergies between the projects)
- Stewardship – there is someone or a team in your organisation that looks at all the Innovation activities and projects together and coordinates them. This coordination does not have to be formal; it can also be based in internal leadership and giving autonomy to people to innovate. Yet, there should be someone to steward the effort in some way or another.
- Supportive structures – your organisation has thought about how HR, procurement, accountability relationships, etc. support different types of innovation in your portfolio and reviews them periodically
- Different purposes – good innovation portfolios allow for different types of innovation big missions and avoiding lock-in through anticipation, enhancement of current activities and adapting to evolving needs. The portfolio does not have to be ‘balanced’, but these functions (based on what makes sense for your organisation) have to be present
- Synergies – opportunities and strengths between innovation activities are not only searched, but they are exploited for broader impact
- Resourcing – good portfolio management does not only involve coherence between activities and their goals, but also overview on how they are resourced both in terms of finances and also capabilities, skills etc. That feeds into strategic decision-making within the organisation.
- Monitoring – portfolios are measured and monitored in ways that make sense (e.g., if you are in the field of radical innovation then not all projects in your portfolio have to succeed – it matters if your portfolio is successful, so, figure out how to capture that).
- Evaluation – our portfolio intentions may be good, but is it delivering change on the ground – good portfolios get evaluated periodically, so, the attention does not go to singular projects, but strategic aims your organisation wants to achieve
- Learning – good portfolio management means setting up effective learning loops, so, across the organisation people learn about the successes and failures
- Communication – best portfolios are those that are continuously in people’s heads and not on paper, so, why and how you manage your portfolio needs to be effectively communicated. In many cases, you also need buy-in from outside of your organisation to make your portfolio work. Without effective communication, this will be a difficult task.



Optional: **Play the video with the description of the portfolio exploration tool:**

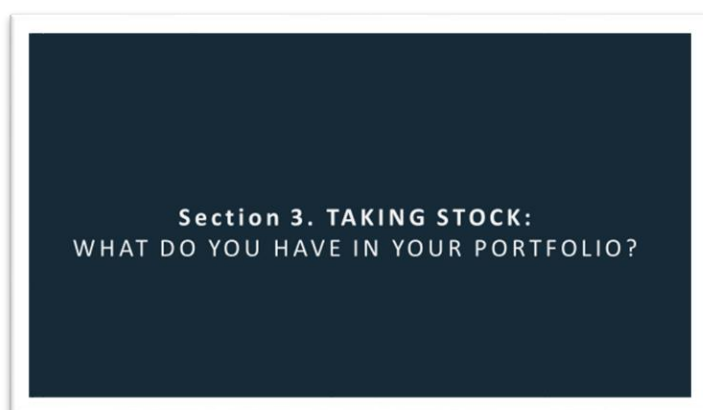
<https://youtu.be/qKsZx1EVNYk>

If you are unable to play the video during the workshop, as facilitator please familiarise yourself with the video beforehand. You may also send the video link to the participants before the workshop.

Section 3. Taking stock: what do you have in your portfolio? (60 minutes) (Module 1 and 2)

Purpose: *In this section, you and your team or organisation will look at your own innovation portfolio to understand the innovation bias in your organisational culture and projects. In this section, you need the results from Module 1 and 2 of the online self-assessment tool.*

Taking stock

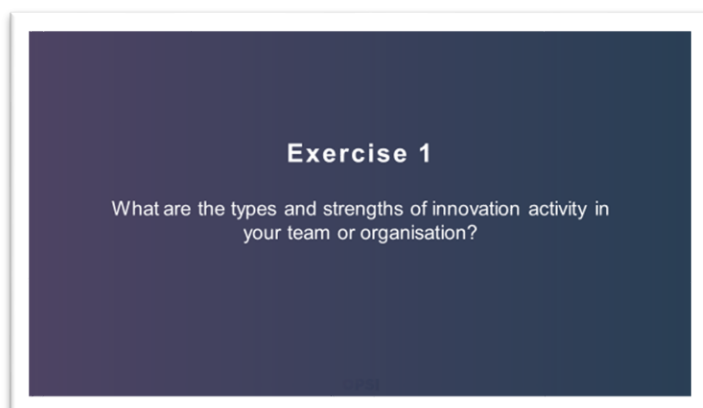


Facilitator script (use as needed):

“We will now look at our own organisation or team innovation portfolio. The purpose is to get a better understanding of the types of innovation our organisation or team is biased towards, and which type our projects support.

This section consists of two exercises. The first 30 minutes of this hour-long section, we will discuss the types and strengths of innovation activity in our organisation or team. The second half of the hour, we will discuss which of our projects are working in which areas of innovation. The exercise is discussion based and we will compare the self-assessment results with our own perceptions.”

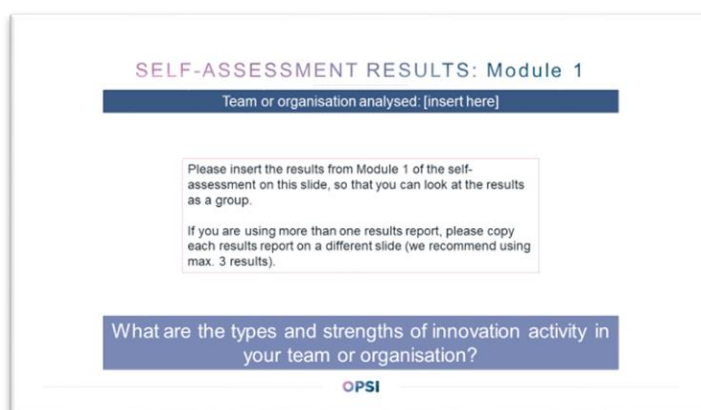
Exercise 1 explanation



Facilitator script (use as needed):

“In this first exercise, we will discuss the results of Module 1 of the self-assessment tool, that is, the types of innovation activity in our organisation or team. We will compare the self-assessment results with our own perceptions.”

Group discussion on Module 1 results



Activity

As a group, look at the results from Module 1. As a group, discuss the types and strengths of innovation activity in your team/organisation.

There are several variations to this exercise, depending on the number of self-assessment results you are using (we recommend you use between 1 and 3 results maps: if you have more than 3 results maps to choose from, pick maps that are different to each other).

- Option 1 (one result): Discuss the map as a group. Participants can volunteer to discuss their results if they have completed them individually beforehand.
- Option 2 (up to 3 results): Compare the results maps and discuss as a group. Participants can volunteer to discuss their results. Participants can volunteer to discuss their results if they have completed them individually beforehand.

As facilitator, you can prompt discussion with the following questions:

- What are the types and strengths of innovation activity in your team or organisation?
- Which type(s) of innovation does your team or organisation tend to support?
- If you are using several results maps, where are the differences between results? What might explain these differences?
- Why do you think your organisation tends to support missions/ adaption/ enhancement/ anticipation?
- Are you satisfied with what the Results indicate about your team or organisation? Who was surprised by their result and who had their previous assumptions confirmed?
- If you are doing this exercise as a team, would the results be the same for the entire organisation?
- Do you think this result is indicative of a short-term or long-term trend?
- Has Covid-19 shifted the composition of your innovation activities?



Exercise duration: 25 minutes.

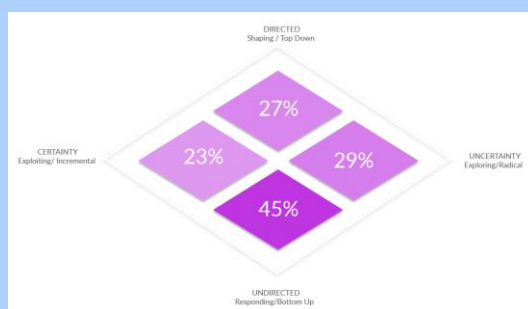


As facilitator, please take notes of the participant's observations.

- **Virtual workshop:** For virtual workshops, you can ask participants write their comments and questions in the chat. You can summarise observations on a blank slide or a blank shared document (e.g., Google Docs). If you feel comfortable with using digital tools, you can use a virtual notetaking tool (e.g., <https://padlet.com/>) or a virtual whiteboard (e.g., <https://www.mural.co/>).
- **In-person workshop:** For in-person workshops, you can ask participants to write their comments on post it notes. You can summarise observations on a whiteboard or flip chart paper.



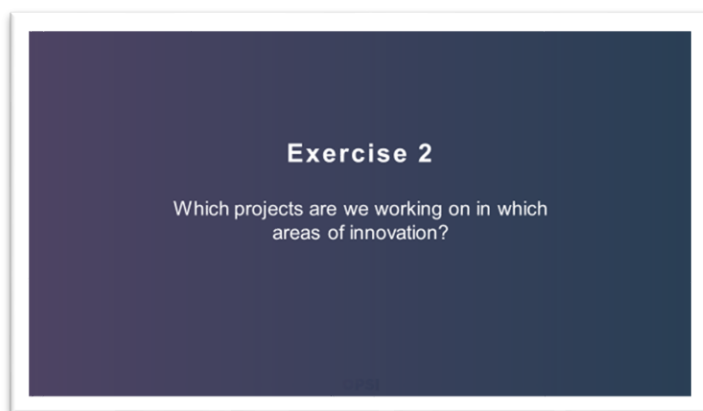
For this exercise, you need the results from Module 1 of the PET online self-assessment. You can use between one and 3 results maps. We recommend you use the graphic from your personalised results report that resembles the example below:



Be sure to label the results with the specific team or organisation that was analysed.

- **Virtual workshop:** For virtual workshops, please share a slide with a screenshot of your assessment results on your screen.
- **In-person workshops:** For in-person workshops, please print out the results or project them on a screen.

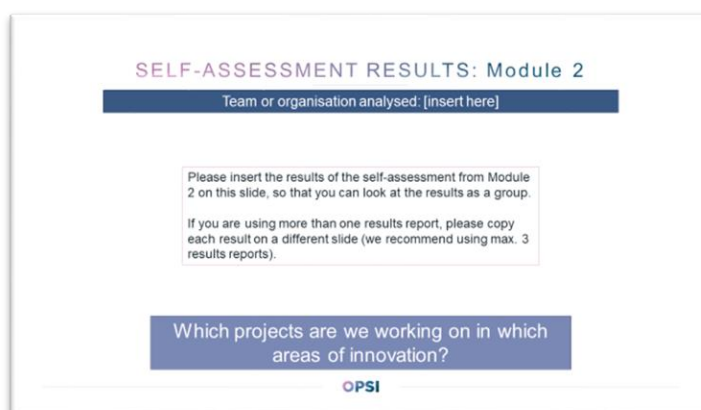
Exercise 2 explanation



Facilitator script (use as needed):

“In this second exercise, we will discuss the results of Module 2 of the self-assessment tool, that is, the types of projects we work on and which areas of innovation they support. We will again compare the self-assessment results with our own perceptions. For this activity, it is important to look at the shape and distribution of the entire set of projects versus focusing on individual projects, except when there are differing perspectives and results on the same project.”

Group discussion on Module 2 results



Activity

As a group, look at the results from Module 2. As a group, discuss which areas of innovation your projects work in.

There are several variations to this exercise, depending on the number of self-assessment results you are using (we recommend you use between 1 and 3 results maps: if you have more than 3 results maps to choose from, pick maps that are different to each other).

- Option 1 (one result): Discuss the map as a group. Participants can volunteer to discuss their results if they have completed them individually beforehand.
- Option 2 (up to 3 results): Compare the results maps and discuss as a group. Participants can volunteer to discuss their results. Participants can volunteer to discuss their results if they have completed them individually beforehand.

As facilitator, you can prompt discussion with the following questions:

- Describe the distribution and overall shape of your project map? What does it tell you?
- If you are using several results maps, where are the differences between results?
- Does this reflect what the team/organisation does? Should something be added? Why do you think this innovation portfolio has emerged in your organisation?
- Do you think there are some innovation areas that are not covered, or areas in which the organisation should invest more?
- If there are many projects in between facets or in the centre, is it clear what is expected of these projects? Discuss any competing interests or purposes of the specific projects that landed in the middle.
- Are there any synergies or dependencies between projects/activities? Are there any projects that are more radical/critical in nature and help you to avoid lock-in (e.g., in the anticipatory innovation) space?
- How does this result compare with the earlier result? What might explain any discrepancies?
- Has Covid-19 changed the composition or distribution of your project map?



Exercise duration: 25 minutes.

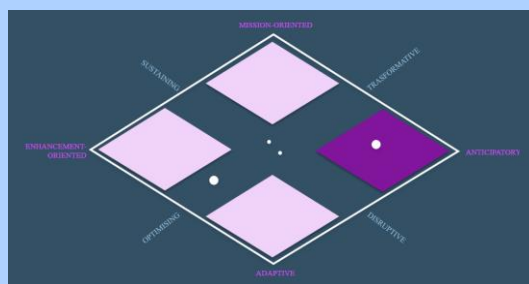


As facilitator, please take notes of the participant's observations.

1. **Virtual workshop:** For virtual workshops, you can ask participants write their comments and questions in the chat. You can summarise observations on a blank slide or a blank shared document (e.g., Google Docs). If you feel comfortable with using digital tools, you can use a virtual notetaking tool (e.g., <https://padlet.com/>) or a virtual whiteboard (e.g., <https://www.mural.co/>).
2. **In-person workshop:** For in-person workshops, you can ask participants to write their comments on post it notes. You can summarise observations on a whiteboard.



For this exercise, you need the results from Module 1 of the PET online self-assessment. You can use between one and 3 results maps. We recommend you use the graphic from your personalised results report that resembles the example below:

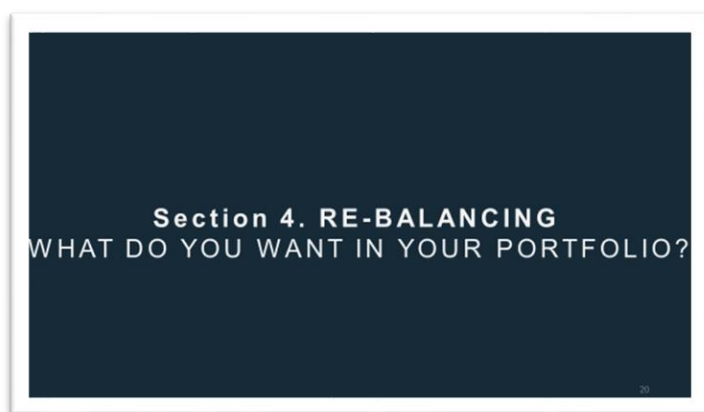


- **Virtual workshop:** For virtual workshops, please share a slide with a screenshot of your project-based mapping results on your screen.
- **In-person workshops:** For in-person workshops, please print out the results or project them on a screen.

Section 4. Re-balancing your portfolio: what do you want in your portfolio? (30 minutes)

Purpose: This section is about rebalancing your innovation portfolio. It aims to spark a discussion on how you can align your innovation portfolio to your organisational goals.

Rebalancing your portfolio



Facilitator script (use as needed):

“In this section, we will discuss whether our innovation portfolio aligns to our organisational goals, and how we can use our innovation activities in the best way to achieve our goals.”

Group discussion on organisational goals



Activity

Show participants the list of strategic goals for your team or organisation that you have prepared. Ask participants to react: do they agree with the goals, are there any others? Make changes to the list if needed.



Exercise duration: 10 minutes.



As facilitator, please make changes to the list based on the discussion with participants.

- **Virtual workshop:** For virtual workshops, you can make changes directly on the slide, or use a shared document (e.g., Google Docs), a virtual notetaking tool (e.g., <https://padlet.com/>) or a virtual whiteboard (e.g., <https://www.mural.co/>).
- **In-person workshop:** For in-person workshops, you can use a whiteboard.



For this exercise, you need to prepare a list of your team's or organisation's goals (formal or informal). Please insert this list on the slide.

Group discussion on portfolio alignment



There are two activities related to this exercise.

Activity 1

Ask each participant to look at the section from the results report called “Potential threats and vulnerabilities”. Then ask them to call out things from the results that are relevant for the alignment conversation.



Exercise duration: 5 minutes.



For this exercise, you need to prepare the relevant section from the Results report(s). Please copy information from Results Report (“Threats and vulnerabilities” section) on a slide and indicate the related Result (i.e. Strong in Enhancement-oriented innovation) to which these threats and vulnerabilities apply. This text may differ slightly in different Result reports, see below for how to handle this.

- Scenario 1: one result – copy entire Threats and Vulnerabilities section onto slide and ask people to react.
- Scenario 2: several results – choose a representative or average result and copy the entire Threats and Vulnerabilities section onto slide or pick a couple of points from differing Results Reports on a slide and ask people to react.

Activity 2

As a group, discuss how you can align your innovation projects to your organisational goals.

Please ask the following mandatory question:

What overall vulnerabilities or opportunities in your innovation portfolio have been revealed by the recent crisis?

As facilitator, please ask 2-3 additional questions from the following list:

Networks and Partnerships

1. Are you responsible for your entire innovation portfolio, or do you rely on other people for some activities?
2. Where could different parts of the organisation complement each other?
3. Where are the gaps in your portfolio and opportunities for collaboration?

Stewardship of the portfolio

4. Who is in charge for stewarding the portfolio?
5. What were the scores from the capability assessment? What makes it difficult to do portfolio management at our organisation?
6. What is standing in the way for good innovation portfolio management: organisational silos, what incentivises people day-to-day, timing of internal and external processes (e.g., fiscal cycles)?
7. What existing structures and mechanisms can we use to do it better?

Shifting the portfolio

8. Which facets of innovation would better contribute to achieving your team or organisational goals?
9. What are the potential issues that might arise from the current mix of innovation strengths?
10. How might individual projects be opportunities to shift the team or organisation into other types of innovation (as a strategy in disguise)?
11. Could some projects or activities provide the “cover” or mandate to try new types of innovation? Which ones?
12. Which types of innovation might you make stronger or better? What would that look like in our team/organisation?
13. Where could the organisation invest more?
14. What are the tools and methods you need to shift the team/organisational innovation focus?



Exercise duration: 15 minutes.



As facilitator, please make notes of the participants' comments.

- **Virtual workshop:** For virtual workshops, you can use a shared document (e.g., Google Docs), a virtual notetaking tool (e.g., <https://padlet.com/>) or a virtual whiteboard (e.g., <https://www.mural.co/>).
- **In-person workshop:** For in-person workshops, you can use a whiteboard or flip chart paper.

Please send the answers from participants to the mandatory question to OPSI after the session.

You can contact OPSI at opsi@oecd.org.

Section 5. Wrap up and next steps (10 minutes)

Purpose: As you have reached the end of the workshop, this section is a chance to wrap up the discussion and gather feedback from participants. This is also a good time to remind participants of the learning session where they can share their experiences.

Wrap up



Facilitator script (use as needed):

“We have now finished the workshop. In the last few minutes of the session, I am looking for some feedback from you on how you found this workshop and remind you of next steps.”

Gather feedback



Activity

In turn, ask participants to share their feedback on the session. How did they find the session and what did they find useful? Did the session meet their expectations?



Exercise duration: 5-8 minutes.



As facilitator, please make notes of the participants' comments.

- **Virtual workshop:** For virtual workshops, you can use a shared document (e.g., Google Docs), a virtual notetaking tool (e.g., <https://padlet.com/>) or a virtual whiteboard (e.g., <https://www.mural.co/>).
- **In-person workshop:** For in-person workshops, you can use a whiteboard.

Please send the notes of participants' feedback to OPSI after the session. You can contact OPSI at opsi@oecd.org.

Learning session at Government after Shock



Facilitator script (use as needed):

“Thank you for participating in the portfolio exploration session! Like us, other teams and organisations around the world are hosting their own sessions. After this session, join the Observatory of Public Sector Innovation for an opportunity to share the learnings from your own session with an international community of peers at the Government after Shock conference on the 17th November 2020. It is a collaborative sharing and learning session with organisations who have undertaken the portfolio exploration event. Please sign up and participate in this session to share your experiences and connect with others. We will send you an invitation to the learning session afterwards.”

Thank you



Facilitator:

End the workshop.